

COVER SHEET FOR AMENDMENT OF POST-TRAVEL SUBMISSION

Date/Time Stamp
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PUBLIC RECORDS
2021 SEP 13 AM 10:38

Instructions: Use this form as a cover sheet for any paperwork you may need to submit to the **Office of Public Records** in order to make your Privately Sponsored Post-Travel Submission complete in accordance with Rule 35. **Only complete this form if you need to submit an amendment to a post-travel filing you have already submitted.**

SUBMIT DIRECTLY TO THE OFFICE OF PUBLIC RECORDS IN 232 HART BUILDING

Name of Traveler: James Hitchcock

Employing Office/Committee: U.S. Senator Marco Rubio

Travel Expenses Paid by (List all sources): American Compass

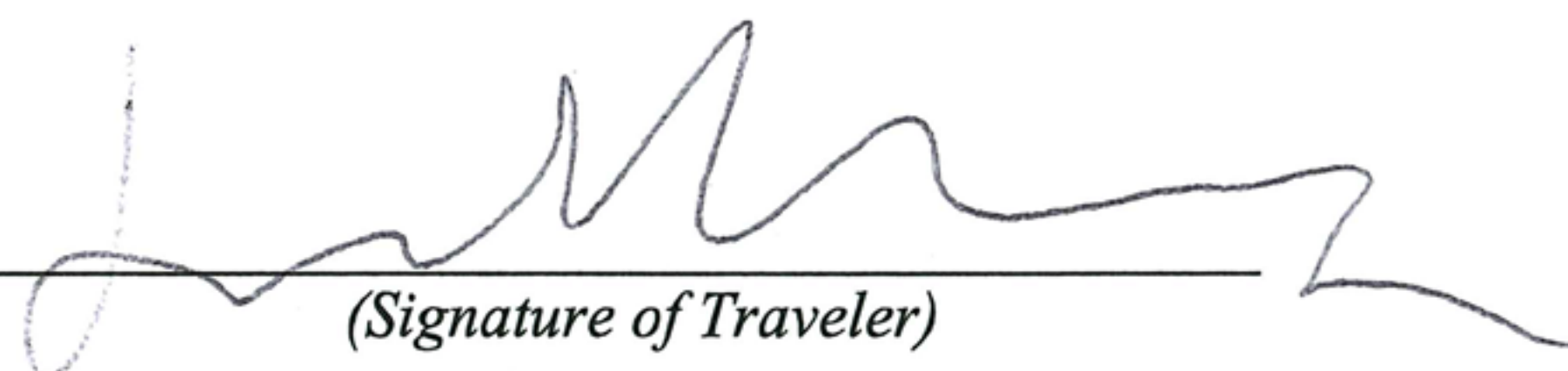
Travel Date(s): 7/16/21 - 7/18/21

Description/Title of Attached Forms: Employee Pre-Travel Authorization Form

Purpose of Amendment (describe the reason for amending original submission): Neglected to include
Employee Pre-Travel Authorization Form with original packet

9/13/2021

(Date)


(Signature of Traveler)

Date/Time Stamp:

EMPLOYEE PRE-TRAVEL AUTHORIZATION

Pre-Travel Filing Instructions: Complete and submit this form at least 30 days prior to the travel departure date to the **Select Committee on Ethics in SH-220**. Incomplete and late travel submissions will **not** be considered or approved. This form **must** be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler: James HitchcockEmploying Office/Committee: Senator Marco RubioPrivate Sponsor(s) (list all): American CompassTravel date(s): 7/16/21-7/18/21

*Note: If you plan to extend the trip for any reason you **must** notify the Committee.*

Destination(s): Charlottesville, VA

Explain how this trip is specifically connected to the traveler's official or representational duties:

James's work involves economics issues for Senator Rubio, which will be a central part of the policy discussion over the weekend. Apropos to his speechwriting role, other speechwriters will be in attendance, providing an opportunity to discuss contemporary economic issues and how to translate them into political rhetoric. James also serves as a policy advisor to Senator Rubio. This workshop will feature extensive discussion of economic policy and allow him important intellectual engagement with ongoing economic issues, a substantial benefit that he can apply to his own work on policy in the office.

Name of accompanying family member (if any): _____

Relationship to Employee: ☐ Spouse ☐ Child

I certify that the information contained in this form is true, complete and correct to the best of my knowledge:

6/21/2021

(Date)



(Signature of Employee)

TO BE COMPLETED BY SUPERVISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, Secretary for the Majority, Secretary for the Minority, and Chaplain):

I, Marco Rubio hereby authorize James Hitchcock
 (Print Senator's/Officer's Name) (Print Traveler's Name)

an employee under my direct supervision, to accept payment or reimbursement for necessary transportation, lodging, and related expenses for travel to the event described above. I have determined that this travel is in connection with his or her duties as a Senate employee or an officeholder, and will not create the appearance that he or she is using public office for private gain.

I have also determined that the attendance of the employee's spouse or child is appropriate to assist in the representation of the Senate. (signify "yes" by checking box) ☐

06/21/2021

(Date)



(Signature of Supervising Senator/Officer)



AMERICAN
COMPASS

To: James Hitchcock, Sen. Marco Rubio

6/13/21

- ▶ American Compass
300 Independence Avenue SE
Washington, DC 20003
- ▶ contact@americancompass.org
- ▶ www.americancompass.org

Invitation

American Compass Workshop on Conservative Economics

Friday, July 16 – Sunday, July 18, 2021

Boar's Head Resort

Charlottesville, VA

The purpose of this trip is to provide interested policy professionals with the opportunity to encounter new political and economic ideas that can help shape a conservative consensus that emphasizes the importance of family, community, and industry to the nation's liberty and prosperity. This will include industrial policy, labor, family formation, financial regulation, and many more topics that participants have contributed to and learned from over the past year.

You are being invited because of your interest in conservative economic policy. If you choose to attend, we will cover your lodging, meals, and provide a charter bus to and from Charlottesville and DC.

Sincerely,

Oren Cass
Executive Director



AMERICAN COMPASS

Workshop on Conservative Economics

Friday, July 16 – Sunday, July 18, 2021

Boar's Head Resort | Charlottesville, VA

FRIDAY, JULY 16, 2021

2:00pm	<i>Attendees arrive and board bus</i>	<i>Union Station</i>
2:30pm	<i>Bus departs to Boar's Head Resort</i>	
4:30pm	<i>Bus arrives at Boar's Head Resort</i>	
4:30–6:00pm	REGISTRATION <i>Attendees check-in to overnight rooms</i>	<i>Front Lobby</i>
6:00–7:30pm	WELCOME RECEPTION	<i>Hearth Room</i>
7:30–9:30pm	DINNER DISCUSSION Rewriting the Conservative Consensus Keynote by Oren Cass (Exec Dir, American Compass) <i>What are neoliberalism and market fundamentalism, where did they come from, and how did they overtake conservative economic thought in America? Which issues facing policymakers today offer the greatest challenge to existing economic orthodoxy and opportunity for restoring a conservative consensus?</i>	<i>Hearth Room</i>

SATURDAY, JULY 17, 2021

7:30–9:30am	BREAKFAST	<i>Patio Room</i>
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SESSION I: A REALIGNMENT IN PROGRESS

9:30–1:00pm

Attendees will be polled on a variety of ongoing policy debates to identify those topics that most starkly divide the group. Three of those topics will then be selected for breakout conversations, first in groups of ~6 and then in larger groups to recap conclusions.

9:30–10:00am	POLLING FOR GROUP EXERCISE BREAKOUTS Policy subjects to be polled for discussion: <i>election integrity, tax reform, industrial policy, the environment, immigration, judicial priorities, the two-party system, family policy, labor, modern monetary theory, higher education, workforce development, algorithmic advertising, data privacy, declensionism, healthcare, and attendee-generated submissions</i>	<i>The Ballroom</i>
10:00–11:00am	SMALL GROUP BREAKOUTS Each participant will choose a topic and be assigned to a small breakout group to discuss the topic in depth.	<i>Albemarle, Blue Ridge and Commonwealth Rooms</i>
11:00–12:00pm	LARGE GROUP READOUTS Small groups will reconvene in larger groups of 15 to 20 to share conclusions from their conversations and identify areas of consensus and disagreement.	<i>Albemarle, Blue Ridge and Commonwealth Rooms</i>
12:00–1:00pm	LUNCH DEBRIEF Participants from the morning session's different topic groups will share conclusions with each other.	<i>The Ballroom</i>
1:00pm–2:30pm	SESSION II: HEALTHCARE DEBATE Attendees will participate in an Oxford-style debate led by two teams of two participants on the question of whether healthcare reform should emphasize greater government involvement and support or greater reliance on market forces and individual choice.	<i>The Ballroom</i>
2:30–3:00pm	BREAK / AFTERNOON SNACK	<i>The Ballroom</i>
3:00–4:30pm	SESSION III: POLICY WORKSHOP Volunteers from among the attendees will present ambitious policy proposals and arguments that they have been working on, for testing and refinement by small panels of other attendees.	<i>The Ballroom</i>
4:30–6:00pm	BREAK	
6:00–8:00pm	DINNER	<i>Patio Room</i>

8:00–9:30pm	SESSION IV: PAST AS PROLOGUE Attendees in small groups will use trivia about past political realignments and major legislative efforts as a jumping off point for discussion about parallels to and differences in the current environment, and implications for their own work.	<i>Hearth Room</i>
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SUNDAY, JULY 18, 2021

8:30–9:30am	BREAKFAST & CHECK-OUT Attendees check-out of their overnight rooms and store their luggage in the front lobby.	<i>Patio Room & Front Lobby</i>
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9:30–10:00am	SESSION V: CHARTING A COURSE Remarks by Oren Cass synthesizing key takeaways from the weekend's discussions, highlighting areas for further debate and research, and proposing areas for potential progress by policymakers.	<i>Hearth Room</i>
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10:00–11:00am	SESSION VI: THE COMING YEAR IN FOCUS American Compass shares its upcoming projects and highlights opportunities for attendees to continue to participate and refine their policy ideas.	<i>Hearth Room</i>
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10:00am	The Legislative Pipeline Chris Griswold (Policy Dir, American Compass)
10:30am	Our Research Agenda Wells King (Research Dir, American Compass)

11:00–11:45am	BOARD CHARTER BUS Attendees check-out of their rooms and load their luggage onto the charter bus.	<i>Front Lobby</i>
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12:00pm	<i>Bus departs to Union Station</i>	<i>Front Lobby</i>
2:00pm	<i>Bus arrives at Union Station</i>	<i>Union Station</i>



American Compass

Workshop on Conservative Economics

Friday, July 16 – Sunday, July 18, 2021

Boar’s Head Resort | Charlottesville, VA

- ▶ American Compass
300 Independence Avenue SE
Washington, DC 20003
- ▶ contact@americancompass.org
- ▶ www.americancompass.org

Invitation List

About the List:
The following individuals were extended an invitation to the American Compass Workshop on Conservative Economics due to their interest in conservative economic policy.

Senate			
Haim	Engelman	Sen. Marco Rubio	Legislative Assistant
Sam	Mulopulos	Homeland Security and Governmental Affairs Committee	Professional Staff Member
Mike	Needham	Sen. Marco Rubio	Chief of Staff
Jacob	Stubbs	Homeland Security and Governmental Affairs Committee	Professional Staff Member
James	Hitchcock	Sen. Marco Rubio	Speechwriter
Caleb	Orr	Sen. Marco Rubio	Senior Policy Adviser
Vijay	Menon	Sen. Josh Hawley	Legislative Aid

PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should **NOT** submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee **MUST** also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

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1. Sponsor(s) of the trip (please list all sponsors): American Compass

 2. Description of the trip: American Compass's first economics workshop, focused on discussing economic policy that can support legislation that is good for American industries, families, and communities.

 3. Dates of travel: 07/16/21 - 07/18/21

 4. Place of travel: Charlottesville, Virginia

 5. Name and title of Senate invitees: See Attachment

 6. I *certify* that the trip fits one of the following categories:
 - ☒ (A) The sponsor(s) are not registered lobbyists or agents of a foreign principal **and** do not retain or employ registered lobbyists or agents of a foreign principal **and** no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.
 - OR –
 - ☐ (B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (*see question 9*).

 7. ☒ I *certify* that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
 - AND –
 - ☒ I *certify* that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.

 8. I *certify* that:
 - ☒ The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for *de minimis* lobbyist involvement.
 - AND –
 - ☒ The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (*see question 9*).

9. **USE ONLY IF YOU CHECKED QUESTION 6(B)**

I *certify* that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a foreign principal, one of the following scenarios applies:

- ☐ (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and **one** overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip.

– OR –

- ☐ (B) The trip is for attendance or participation in a one-day event (exclusive of travel time and **two** overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *on any segment* of the trip (*see questions 6 and 10*).

– OR –

- ☐ (C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee *at any point* throughout the trip.

10. **USE ONLY IF YOU CHECKED QUESTION 9(B)**

If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:

11. ☒ An itinerary for the trip is attached to this form. I *certify* that the attached itinerary is a detailed (hour-by-hour), complete, and final itinerary for the trip.

12. Briefly describe the role of each sponsor in organizing and conducting the trip:

American Compass is the sole sponsor and is organizing all aspects of this trip.

13. Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:

American Compass is a 501(c)(3) non-profit organization founded in 2020 whose mission is to restore an economic consensus that emphasizes the importance of family, community, and industry to the nation's liberty and prosperity. Our first workshop is planned around substantive policy sessions to aid staff.

14. Briefly describe each sponsor's prior history of sponsoring congressional trips:
- This is our organization's first sponsored trip with congressional invitations.

15. Briefly describe the educational activities performed by each sponsor (other than sponsoring congressional trips):

We are a leading resource for elected officials, their staff and the media, who rely on our regular policy

reports, essays, discussions, and debates to help policymakers navigate the limitations that markets and

government each face in promoting the general welfare and the nation's security.

16. Total Expenses for Each Participant:

	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses
<input checked="" type="checkbox"/> Good Faith estimate <input type="checkbox"/> Actual Amounts	\$50 (per person cost of charter bus to Charlottesville and DC)	\$279/night = \$558	\$300 (5 meals and 2 snacks)	

17. State whether a) the trip involves an event that is arranged or organized *without regard* to congressional participation or b) the trip involves an event that is arranged or organized *specifically with regard* to congressional participation:

This workshop is arranged without regard to congressional participation.

18. Reason for selecting the location of the event or trip

American Compass limited the search for an appropriate venue for our program within a two-hour drive of

Washington, D.C.

19. Name and location of hotel or other lodging facility:

Boar's Head Inn, Charlottesville, Virginia

20. Reason(s) for selecting hotel or other lodging facility:

The venue provided a secluded location outside of DC with the necessary meeting space to host our

program and was the more affordable option when compared to comparable venues.

21. Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:

Our nightly rate is \$150 more, and projected meal costs are \$18.75 more (travel day 1), \$99 more

(educational day with all meals and refreshments), and \$5.25 less (travel day 2).

22. Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:

A budget charter bus is being commissioned to take us to Charlottesville and back.

23. ☒ I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).

24. List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:

25. I hereby *certify* that the information contained herein is true, complete and correct. (For trips involving more than one sponsor, you *must* include a completed signature page for each additional sponsor):

Signature of Travel Sponsor: 

Name and Title: Oren Cass, Executive Director

Name of Organization: American Compass

Address: 300 Independence Avenue SE, Washington, DC 20003

Telephone Number: 413-200-9456

Fax Number: N/A

E-mail Address: oren.cass@americancompass.org